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<b>TRANSMITTAL SLIP</b>		<b>DATE</b> 8 AUG 1983
<b>TO:</b> See Dist		
<b>ROOM NO.</b>	<b>BUILDING</b>	
<b>REMARKS:</b> Dist: Orig - back to DD/ODP 1 - DD/P/ODP 1 - DD/A/ODP 1 - C/SPS/ODP 1 - C/MS/ODP 1 - EXO/ODP		
<b>FROM:</b> D/ODP		
<b>ROOM NO.</b>	<b>BUILDING</b>	<b>EXTENSION</b>

FORM NO. 241  
1 FEB 55

REPLACES FORM 36-8  
WHICH MAY BE USED.

(47)

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5 AUG 1966

NOTE TO: DD/ODP

FROM: D/ODP

Ed,

1. Our general perceptions with regard to Bob Kohler's paper seem to be quite congruent. One of the problems that I think the Agency has is not facing up to the discipline of establishing central goals and priorities. Our power base resides in our expertise, our capabilities, and the respect that those two elements earn for the Office as it provides service for the rest of the Agency.

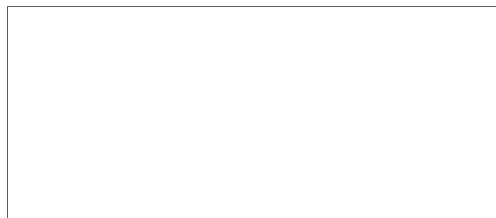
2. Not only have we written several Five-Year Plans already, but the responses coming in to the Office Strategic Plan will basically constitute yet another version of a Five-Year Plan.

3. It certainly would be nice if we could find a way of doing large systems that did not prove inordinately expensive.

4. Your point that S&T must be included as part of the fabric of the Agency is well taken.

5. By and large, as I noted in the beginning, we are in agreement.

STAT



5 AUG 1983

STAT



I would make the following observations about Kohler's paper.

1. The concept of a Central Review Authority makes sense. The philosophy espoused is based on the IBM concept of Business Systems Planning. This is a concept I have recommended to the last two D/ODP. Each has rejected it as an approach that erodes his power base. I have attached my copy of the IBM writeup on the approach FYI. The only real issue regarding implementation is the doggedly decentralized nature of the Agency. Central authority is not accepted by any directorate but ours.

STAT

2. The comments on a Five-Year Information Systems plan embody nothing new. We have written several five-year plans in ODP, [redacted] was chartered to essentially do this Agency wide. As an EDP professional, I find the comments on approach to be patronizing. We have a Systems Engineering Branch in ED that already does much of what is discussed.

3. The comments related to baseline development processes speak to the Large Systems Approach that has already proven to be so very expensive in both the DD/S&T and ODP.

4. The remarks concerning ODP and OC are fine. I would prefer to have the DDA tell us this. What about other communications systems being built for DD/S&T. Aren't they part of the Agency?

5. The concept of an Information Systems Integration Organization is also fine. We used to call it the IHSA.

STAT



REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION

The Requirements & Technology Acquisition Working Group has been formed to support the Information System Board in resolving the following issues related to the planning and development of Agency automated Information Systems:

- (a) Defining how to tie Information Systems planning to budgeting to programming more directly.
- (b) Establishing a more efficient and flexible process to analyze requirements, match requirements with available technology and proceed rapidly to prototyping and procurement.
- (c) Establishing a validation procedure for current requirements.

The specific objectives of the Requirements & Technology Acquisition Working Group are to define the policies and methodologies that will support the efficient and effective integration of information system elements, from Requirements Development through to Resource Acquisition & Management.

The proposed approach of the working group centers on the definition and establishment of a Central Review Authority which will review and approve the requirements for all projects to be tasked to IA elements and will review and approve significant acquisitions of hardware and software. The central authority will develop, and be guided by a five-year "Business" Plan \* which identifies current information system resource capacities and margins along with identification of current and projected user needs and plans for satisfaction of these needs. This plan will be updated on an annual basis.

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\* A list of approved projects based on either self developed initiatives or program needs.

REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION (Cont'd)

The following tasks will be performed to define the character, membership and operations of the central review authority and to develop the data and standards the authority will require to begin initial operations.

1. Define Central Review Authority

Define the membership and the roles and responsibilities for a central review authority. Issues to be resolved shall include as a minimum:

- (a) Membership of the authority considering appropriate representation of ODP, OC, customers of ODP and Agency organizations involved with data processing technologies. Also consider desired total size of a workable review authority or board, the need for non-technical membership such as budgets and the criteria/process for determining the chairperson.
- (b) Definition of the bounds on the authority processes including definitions of the classes of requirements and procurements to be reviewed; approving of procurement and development standards; and maintaining a formal five-year development plan.
- (c) Operational methodology of the review authority including the input of issues, the review of issues and any appeals process to higher Agency management. Also, the documentation and configuration control of authority outputs.
- (d) Scheduling of the review authority including normal frequency of meetings, ad hoc meetings for special issues and processes and annual activities in support of the Agency budget development process.

REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION (Cont'd)

1. Define Central Review Authority (Cont'd)

- (e) Definition of the processes for evaluation of the addition, redefinition or deletion of a "Project" to/from the five-year Business Plan. The board will evaluate the resource implications and procurement strategy. Also, define the processes to approve and authorize yearly technology initiatives and evaluate yearly results.
- (f) Determine any other functions of the review authority such as establishing lower level review boards with charters to control specific projects or technology development activities
- (g) Develop a briefing package to describe the central review authority and its associated processes. This briefing will be given to all organizations which will be developing requirements for or implementing Information Systems projects so that the organizations will understand and be able to participate in the requirements development and approach processes.

2. Define Five-Year Plan

Prepare a draft of an initial five-year Information Systems development plan. This plan will be formally approved by the review authority and then maintained and updated in the future. Development of the initial draft will include:

- (a) Evaluate current ODP & OC information system resources in terms of:

- 1. CPU Capacity
- 2. Storage Capacity ON & OFF Line
- 3. Communications Terminals

REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION (Cont'd)

2. Define Five-Year Plan (Cont'd)

This data would be obtained through orientation briefings provided by ODP & OC and through intensive interview with key ODP & OC personnel.

This data should include an evaluation of current capacity usage evaluation partitioned by major user and user class (Batch Scientific, Batch Administrative, Interactive Query, etc.)

Historical growth over the previous five years should also be gathered for use in developing models for projected needs (this would be coupled with driving requirements for growth to reflect biases or inefficiency).

(b) Evaluate current methodology for resource acquisition:

1. Identify through interviews with key ODP & OC personnel the major users and the manner in which the users specify their need and how ODP/OC acts on these needs.
2. Interview major users and define the technique that they employ in specifying current and projected needs.

(c) Develop a comprehensive list of current and projected (five-year) projects. Characterize projects in terms of resource requirements and projected method of acquisition.

NOTE: For projected software needs, estimated lines of code should be developed with the user by comparison to similar existing packages if nothing else is available.

REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION (Cont'd)

2. Define Five-Year Plan (Cont'd)

- (d) Develop a predictive model of resource needs based on linear regression of previous five-year growth, and the resource need projections defined by users.

Overlay key considerations such as security compartmentalization and network access, and develop a definition of candidate information system architectures required over the next five-years. Take into consideration the current resources and investment and develop a realistic transition strategy to obtain each architectural modification projected.

NOTE: The projected architecture need not be a commitment to design but will be utilized to surface problems and will provide realistic budget projections.

3. Establish Baseline Development Proceses & Standards

These tasks will create a methodology framework for Information Systems projects so these projects can be managed throughout the development and acquisition processes. This methodology will be designed to ensure a product meeting user requirements will be developed and the user will have specific performance and schedule measures during development.

- (a) Define a family of development processes to fit the classes of jobs to be performed. These classes will be defined as a function of parameters such as job size (\$, lines of code, years of development), installation (new system replacement of operational system, merge into operational system) and hardware requirements (exisiting, vendor purchase. development).



REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION (Cont'd)

3. Establish Baseline Development Processes & Standards (Cont'd)

The development processes shall be characterized in terms of major events (specification control, design reviews, coding, system test, readiness reviews), output products (design specs, test results, deliverable and terms), schedule monitoring methodology (milestones, critical paths) and configuration control requirements.

- (b) Define standards for major steps in the development process. These would include definition of the required data and documentation contents at each design review or other event for each class of development process defined in (a) above. These standards will be written as general guidelines for the development processes with the expectations that specific projects would invoke additional standards or request deviations from the general standards.

4. Define ODP/OC Relationship for Networking

ODP has current responsibility for procuring and operating ADP hardware. Communications circuits for networking data processing systems are the responsibility of the Office of Communications. This task would involve the creation of a development methodology to coordinate ODP/OC efforts for future networked systems. Issues to be investigated are the generation of a formal policy of operation and the possibility of establishing a joint ODP/OC team to develop coordinated plans and schedules for new projects which are to be submitted to the review authority for approval. Also, the means of joint development of networking technologies should be established.

REQUIREMENTS & TECHNOLOGY ACQUISITION WORKING GROUP  
TASK DESCRIPTION (Cont'd)

5. Define Information Systems Integration Organization

Develop the definition and charter of an Information Systems Integration function to act as the technical arm of the review authority.

This function will retain cognizance over current and projected capacity. This function shall develop the yearly five-year projections of capacity based on the development of the "Business Plan" to be presented to the central review authority. This function shall also provide the capacity management recommendations for architectural changes and expenditures implied by the plan.

#### TASK PLAN

- o This effort shall be accomplished between 1 September 83 and 1 April 84.
- o The major outputs shall be at 2 briefings and a final report.
  - Interim Briefing - 15 December 83
  - Final Briefing - 01 March 84
  - Report Delivered - 01 April 84

(Report will be in form textual "Facing Pages" of final briefing.)

#### MANPOWER

- o Established a full time COTR who can arrange orientation briefing, interviews and liaison with ODP, OC and Users
- o Establish a team of Sr. System Engineers who can synthesize resources utilization models and candidate architectures
  - 1 HD Project Leader - Interface with COTR & Work Policy & Management Tasks
  - 2 HDS Resource Analysts (HW)
  - 2 HDS Architecture (HW)
  - 1 HD Architecture (SW)
  - 1 HD Architecture (COMM)
  - 1 HD System Development - Central Review Authority Definition
  - 1 HD Standards Development
  - 0.5 HD Program Control
  - 0.5 HD Configuration Control
  - 2 HD Support - Interviews & Data Evaluation
  - 1 HD Clerical Support

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# **Business Systems Planning Executive Overview**



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